

# Client Digital Capabilities: Step-By-Step Instructions

## MyMerrill Alert Settings (Mobile)

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### Turn on/off alert settings in MyMerrill (Mobile):

1. Log on the MyMerrill mobile app
2. Tap “Menu”
3. Scroll down and tap on “Alerts”
4. View a timeline of all alerts under the “Timeline” tab
5. To delete an existing alert:
  - Tap on “Manage Alerts” and tap on the specific alert.
  - Turn off all toggles related to the alert and click “save”
  - It will prompt you and ask if you wish for the alert to be deleted
6. To set a new alert, choose one of the categories below or select “Add Alert”
  - Security  
From here the user can turn on/off the most popular Security Alerts
  - Accounts  
From here the user can turn on/off the most popular Account Alerts
  - Advisor Communications  
From here the user can turn on/off the most popular Communication Alerts
  - Statements and Documents  
From here the user can manage paperless settings
  - Trading  
From here the user can turn on/off the most popular Trading Alerts
  - Markets and Investments  
From here the user can turn on/off the most popular Market Alerts
- Add Alert
  - Investment Alerts: Type a ticker symbol and tap on the ticker that populates. Choose the type of alert you wish to receive (price, earnings, ratings, etc.) and tap on the toggle next to the specific alert. Tap “Done” when finished
  - Account Alerts: Tap on the account you wish to set an alert for. Choose the type of alert you wish to receive by tapping the toggle next to the specific alert. Tap “Done” when finished
  - Security Alerts: Set a password reminder alert and/or choose whether or not to be notified if your User ID is entered on a new computer or mobile device
  - Market Alerts: Choose from alerts that help you stay on top of market activity. Tap the type of alert you wish to receive and then tap on the alert settings and tap “Done” when finished

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